



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Seth Moulton
Status: Member
State/District: MA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---------------------------------------------------------------------------------------------------|-------|---------------------|----------------|--------|--------------------------|
| Liz: America Funds Roth IRA ⇒ American Funds 2045 Target Date Retirement Fund® Class A [MF] | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ AMG Yacktman Focused Fund Class N [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ AQR Long-Short Equity Fund Class N [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Fidelity Government Money Market Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ iShares S&P 500 Index [EF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Metropolitan West Total Return Bond Fund Class I [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ MG Managers Fairpointe Mid Cap Fund Class I [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---------------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------------|-----------------|--------------------------|
| Liz: Eagle Fund IRA ⇒ Oakmark International Fund Investor Class [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Oppenheimer Developing Markets Fund Class A [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Parnassus Core Equity Fund - Institutional Shares [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ T. Rowe Price Institutional Floating Rate Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ TCW Emerging Markets Income Fund Class Institutional [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Vanguard Growth [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Vanguard Mid-Cap [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Vanguard Total Bond Market ETF [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Wasatch Small Cap Growth Fund® Investor Class [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ AMG Yacktman Focused Fund Class N [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Deutsche Managed Municipal Bond Fund Institutional Class [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Government Money Market Fund Daily Money Class Fund [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|----------------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------------|-------------------|--------------------------|
| Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ MFS® Emerging Markets Debt Fund Class A [MF] | SP | None | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oakmark International Fund Investor Class [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oakmark Select Fund Investor Class [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oppenheimer Developing Markets Fund Class A [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ SPDR Nuveen Barclays Short Term Municipal Bond [EF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ T. Rowe Price Institutional Floating Rate Fund [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ T. Rowe Price Tax Free Income Fund [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ TCW Emerging Markets Income Fund Class Institutional [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Vanguard Mid-Cap ETF [EF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ VANGUARD TAX-MA/FTSE DEVELOPED MKTS [EF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Wells Fargo High Yield Municipal Bond Fund - Class Inst [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Wells Fargo Short-Term Municipal Bond Fund - Class A [MF] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--------------------------------------------------------------------------------------|-------|-----------------------|----------------|-------------|--------------------------|
| Liz: Variable Life Insurance ⇒ MainStay Moderate Growth Allocation Fund [OT] | SP | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Life insurance policy, no transactions | | | | | |
| Niece's 529 Account ⇒ American Funds College 2033 Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| PNC Bank Growth Account [BA] | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| PNC Checking Account [BA] | | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Seth: American Funds IRA ⇒ American Funds 2050 Target Date Retirement Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ AMG Managers Fairpointe Mid Cap Fund;I [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ AMG Yacktman Focused Fund;N [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ AQR Long-Short Equity Fund;N [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Fidelity Government Money Market Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ iShares Core S&P 500 ETF [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Metropolitan West Total Return Bond Fund;I [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Oakmark International Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Oakmark Select Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Oppenheimer Developing Markets Fund;A [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--------------------------------------------------------------------------------------------------------|-------|---------------------|----------------|-------------|--------------------------|
| Parnassus Core Equity Fund;Institutional [MF] | | | | | |
| Seth: Eagle Strategies Roth IRA ⇒ Vanguard FTSE Developed Markets ETF WATCH LIST CREATE VEA [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Vanguard Growth ETF [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Vanguard Mid-Cap ETF [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Wasatch Small Cap Growth Fund;Investor [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Xtrackers MSCI EAFE Hedged Equity ETF [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| USAA Checking [BA] | | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--------------------------------------------------------------------------------------------|-------|-----------|----------------|--------------------|--------------------------|
| Liz: Eagle Fund IRA ⇒ AMG Yacktman Focused N [MF] | SP | 05/5/2017 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ BND Vangaurd BD Index [EF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Eagle Fund IRA ⇒ Fidelity Small Cap Value [MF] | SP | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF] | SP | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Metropolitan West Total Return [MF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Eagle Fund IRA ⇒ | SP | 05/5/2017 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|-------------------------------------------------------------------------------------------------------|-------|------------|----------------|--------------------|--------------------------|
| MFS Emerging Markets Debt [MF] | | | (partial) | | |
| Liz: Eagle Fund IRA ⇒ Neuberg Berman [MF] | SP | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Oakmark International Investor [MF] | SP | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Eagle Fund IRA ⇒ Parnassus Equity [MF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Eagle Fund IRA ⇒ TCW Emerging Markets [MF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Eagle Fund IRA ⇒ Vanguard Index FDS Vanguard Growth [EF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Eagle Fund IRA ⇒ Wasatch small cap growth [MF] | SP | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Liz: Transfer on Death Account ⇒ AMG Yachtman focused N [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ AMG Yachtman focused N [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ AMG Yachtman Focus [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Fidelity Small Cap Value Position [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ iShares corps SMP500 [EF] | SP | 12/28/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ iShares S&P 500 Index [EF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|----------------------------------------------------------------------------------------------------|-------|------------|----------------|--------------------|--------------------------|
| Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class A [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ MFS emerging markets debt [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ MFS emerging markets debt [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Neuberger Berman High Income Bond [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Neuberger Berman High Income Bond [MF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Neuberger Berman High Income Bond [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oakmark Intl Investor [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oakmark Intl Investor [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oakmark Intl Investor [MF] | SP | 09/15/2017 | P | \$1,001 - \$15,000 | |
| Liz: Transfer on Death Account ⇒ Oppenheimer Developing Markets [MF] | SP | 07/28/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oppenheimer Developing Markets [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Oppenheimer Developing Markets [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Parnassus Equity [MF] | SP | 09/15/2017 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--------------------------------------------------------------------------------|-------|------------|-------------|--------------------|--------------------------|
| Liz: Transfer on Death Account ⇒ T Rowe Price INSTL Floating Rate Fund [MF] | SP | 09/15/2017 | P | \$1,001 - \$15,000 | |
| Liz: Transfer on Death Account ⇒ T Rowe Price Tax Free Income ADV [MF] | SP | 05/30/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ T Rowe Price Tax Free Income ADV [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ T Rowe Price Tax Free Income ADV [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ TCW Emerging Markets [MF] | SP | 09/18/2017 | P | \$1,001 - \$15,000 | |
| Liz: Transfer on Death Account ⇒ Vanguard FTSE developed market [EF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Vanguard FTSE developed market [EF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Vanguard Index FDS Vanguard Midcap [EF] | SP | 09/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Vanguard Index FDS Vanguard Midcap [EF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Vanguard Index FDS Vanguard Midcap [EF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Wells Fargo Short Term Muni Bond [MF] | SP | 05/15/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Liz: Transfer on Death Account ⇒ Wells Fargo Short Term Muni Bond [MF] | SP | 05/11/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ AMG Yacktman Focused N [MF] | | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ DBX ETF TR MSCI EAFE [EF] | | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ | | 05/5/2017 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|----------------------------------------------------------------------------------|-------|-----------|----------------|--------------------|--------------------------|
| Fidelity Small Cap Value [MF] | | | (partial) | | |
| Seth: Eagle Strategies Roth IRA ⇒ John Hancock Disciplined Value Mid Cap [MF] | | 05/5/2017 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Seth: Eagle Strategies Roth IRA ⇒ Parnassus Core Equity [MF] | | 05/5/2017 | P | \$1,001 - \$15,000 | |
| Seth: Eagle Strategies Roth IRA ⇒ Vanguard Index FDS Vanguard Growth ETF [EF] | | 05/5/2017 | P | \$1,001 - \$15,000 | |

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount |
|--------------------------|---------------|--------------|
| Korn Ferry International | spouse salary | \$694,087.45 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--------------|---------------|-----------------------------|-------------------------|
| JT | Beverly Bank | May 2017 | Personal residence mortgage | \$500,001 - \$1,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--------------|-------------------------|
| Director | Millenium Train Project |
| Board Member | Salem YMCA |

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Trip Details | | | | | Inclusions | | |
|------------------------------------|------------|------------|----------------------------------------------|------------------|-------------------------------------|-------------------------------------|--------------------------|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Washington Office on Latin America | 02/20/2017 | 02/22/2017 | Miami, FL - Havana, Cuba - Boston, MA | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| American Enterprise Institute | 03/10/2017 | 03/11/2017 | Washington, DC - Sea Island, GA - Austin, TX | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o Liz: America Funds Roth IRA (Owner: SP)
- o Liz: Eagle Fund IRA (Owner: SP)
- o Liz: Transfer on Death Account (Owner: SP)
LOCATION: US
- o Liz: Variable Life Insurance (Owner: SP)
- o Niece's 529 Account
LOCATION: MA
- o Seth: American Funds IRA
- o Seth: Eagle Strategies Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Seth Moulton , 05/15/2018